

**MINUTES OF THE OCTOBER 1, 2018 MEETING**

**OF THE PROCEDURES REVIEW COMMITTEE**

**The following were in attendance at the meeting:** Hon. Jennifer Berkenstock, Chair; Hon. Robert Randich; Susan Meagher, *Chief Clerk, Berlin Probate Court*; Heather Dostaler, *Probate Administration Staff Attorney*; Alison Green, *Probate Administration Staff Assistant*; Dana Masullo, *Probate Administration IT Department*

**The following were absent from the meeting:** Hon. Diane Blick; Hon. Peter Barrett; Hon. Chuck Norris; Hon. Barbara Gardner Riordan; Hon. Beverly Streit-Kefalas; Hon. Philip Wright; Gale Pellegren, Chief Clerk, Torrington Area Probate Court; Lori Michalak, Chief Clerk, Shelton Probate Court

Call to order: The meeting was called to order at 9:10 a.m.

Old Business: NONE

New Business: The Committee reviewed, discussed and took action on new and revised forms as shown and evidenced on the attached schedule.

Upon motion duly made and seconded, it was unanimously approved to cancel the November meeting.

Adjournment: Upon motion duly made and seconded, the meeting was adjourned at 10:45 a.m.

Respectfully submitted,

*Susan Meagher*

Susan Meagher, Acting Secretary

**THE NOVEMBER MEETING HAS BEEN CANCELLED**

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**THE NEXT MEETING OF THE PROCEDURES REVIEW COMMITTEE WILL BE ON  
MONDAY, DECEMBER 3, 2018 AT 9:00 A.M.  
IN THE LIBRARY AT PROBATE ADMINISTRATION**

## Forms for Consideration 10-1-18

| PC # | P/C | Form Name                                                                                              | CMS | CMS Case Type | WEB | Suggested Change(s)/Action Taken                                                                                                                                                                                                                                                                                                                           | Date of Committee Review | Committee Action   |
|------|-----|--------------------------------------------------------------------------------------------------------|-----|---------------|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------|
| 151  | p   | Certification/Mailing of Document by Party                                                             |     |               | X   | New Format and Instruction                                                                                                                                                                                                                                                                                                                                 | 10/1/2018                | Approved 10/1/2018 |
| 181  | P   | General Waiver                                                                                         |     |               | X   | New Format and Instruction                                                                                                                                                                                                                                                                                                                                 | 10/1/2018                | Approved 10/1/2018 |
| 205B | P/C | Petition for Certificate Releasing Liens                                                               |     |               | X   | Request from court to request information re: out of state real and tangible personal property for CT residents and CT real and tangible personal property for nonresidents; Query: PC-205B is primarily to determine whether estate tax is due; Will additional information add clarity or possibility result in confusion for courts re: taxable estates | 10/1/2018                | Approved 10/1/2018 |
| 208  | P/C | Request/Recording Attachments to Conn. Estate Tax Return                                               |     |               | X   | New format and instructions; Reference to Permanent Official Record                                                                                                                                                                                                                                                                                        | 10/1/2018                | Approved 10/1/2018 |
| 211  | P   | Affidavit for Filing Will Not Submitted for Probate                                                    |     |               | X   | New format and instructions                                                                                                                                                                                                                                                                                                                                | 10/1/2018                | Approved 10/1/2018 |
| 212A | P   | Request for Order of Distribution                                                                      |     |               | X   | New format and instructions                                                                                                                                                                                                                                                                                                                                | 10/1/2018                | Approved 10/1/2018 |
| 303  | P   | Petition to Terminate Tenancy or Lease/Change of Residence/Sell or Dispose of Household Furnishings of |     |               | X   | Remove certification of mailing which is not required on PC-303. Certification is only required for petitions for placement in an                                                                                                                                                                                                                          | 10/1/2018                | Approved 10/1/2018 |
| 331  | P   | Notice/Right to Hearing on Conservatorship                                                             | X   |               |     | Review notice for consistency with other notice formats                                                                                                                                                                                                                                                                                                    | 10/1/2018                | Approved 10/1/2018 |

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|-----------|-----|----------------------------------------------------------------------------------------------|-----|---------------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|-------------------------------------------------------------|
| 371 & 771 | P   | Conservator's Report & Guardian's Report/Guardianship of Person with Intellectual Disability |     |               | X   | Add language "Make every effort to respond to each question. The fiduciary may use N/A if question is truly not applicable."                                                            | 10/1/2018                | Approved 10/1/2018                                          |
| 412       | P   | Verification RE Restricted Account                                                           |     |               | X   | New Format and Instruction to include direction to file with each account.                                                                                                              | 10/1/2018                | Approved 10/1/2018                                          |
| 413A      | P   | Request RE Withdrawal of Funds from Restricted Account                                       |     |               | X   | New format and instructions                                                                                                                                                             | 10/1/2018                | Approved 10/1/2018                                          |
| 460       | P   | Decree for Sale or Mortgage of Real Property                                                 | X   |               |     | Complete review including addition of address of property; The committee recommended adding additional language re: reverse mortgages                                                   | 8/13/2018; 10/1/18       | Approved 8/13/18; approved 10/1/18 with additional language |
| 570       | P/C | Guardian's Report/Guardianship of the Person of a Minor                                      |     |               | X   | Add language "Make every effort to respond to each question. The fiduciary may use N/A if question is truly not applicable."; New Format; Complete Instructions; convert to letter size | 10/1/2018                | Tabled to next meeting for additional review                |